



USDA TURKEY MARKET NEWS REPORT

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Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The market tone was steady on frozen retail size hens and toms. Trading centered on 20 loads of packer label hens and toms in the East for September shipment. Buyers remained reluctant to commit to current negotiations. Supplies easily satisfied trade needs. Two loads of 10-12 pound wogs moved at 64 cents delivered. Trading was light to fair on fresh tom breast meat, frozen destapped tenderloins and fresh mechanically separated turkey. Balance of items centered on spot loads and less than truck lot volumes. Frozen tom breast meat traded at 123 cents delivered June.



EXPORT MARKET HIGHLIGHTS

Trading was active on thigh meat, light on tom drums. Thigh meat traded in a wide range of values based on market destination. Mixed defatted gizzards traded at 43.50 cents delivered export.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **APRIL 24, 2003**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	61-62	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	-	-
WESTERN REGION 5/	61-62	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	58-59	-	-	-	-	-	-	-	-
WESTERN REGION 5/	58-59	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **APRIL 25, 2003**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	61-62	-	-	-	-	-	-	400	SEP
CENTRAL REGION 4/	60-62	62	62.00	20	-	-	-	-	-
WESTERN REGION 5/	61-62	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	58-59	-	-	-	-	-	-	400	SEP
WESTERN REGION 5/	58-59	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF APRIL 25, 2003	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	61.50**	61.50**	60.20**
CENTRAL REGION	62.00	61.00**	59.00**
WESTERN REGION	61.50**	61.50**	60.20**
16-24 LB TOMS			
EASTERN REGION	59.00**	59.00**	55.20**
CENTRAL REGION	58.50**	58.50**	54.60**
WESTERN REGION	58.50**	58.50**	55.20**

BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	94
FRESH TURKEYS Y TOMS 14-24#	94
FROZEN TURKEYS Y HENS 8-16#	66
FROZEN TURKEYS Y TOMS 14-24#	63
FROZEN TURKEYS Y TOMS 24-28#	65-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	99-129

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 28-APR-2003

	(8-16#) HENS PRICE	(16-24#) LBS TOMS (000) PRICE	LBS (000)
SALES (PROMOTIONS INCLUDED)	67.00	30 64.00	7
SALES (PROMOTIONS NOT INCLUDED)	67.00	30 64.00	7
SALES (PROMOTIONS ONLY)			
SALES (PRICE TO BE DETERMINED)			

**TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS**

MARCH	441,150*
APRIL 1-19, 2003	322,132*
To date 2003	1,588,276*
To date 2002	1,622,252*

*PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS

BY GEOGRAPHICAL AREAS WEEK ENDING 19-Apr-2003
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

		<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
		PCT CHG PW	AVG LIVE WT	OLD BANDED -THOUSAND HEAD-	AVG LIVE WT
-THOUSAND HEAD-					
N EAST	730	-21	21.92	(A)	732 21.92
SATL	710	-12	27.36	(A)	712 27.36
N CENT	2,344	-6	33.27	(A)	2,346 33.27
S CENT	317	-2	22.79	(A)	319 22.79
WEST	398	-6	20.83	(A)	399 20.83
U.S. TOTAL	4,499(B)	-9	28.66	9	4,508 28.66
TO-DATE					
2003	70,444(B)			251	70,695
TO-DATE					
2002	70,278(B)			114	70,392

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 77,000; for the year 931,000; last year to date 663,000.

LIVE TURKEYS SLAUGHTERED

		<u>YOUNG</u>		<u>YOUNG</u>		<u>OLD</u>		<u>TOTAL</u>	
		HENS	TOMS	BREEDERS					
		<u>THOUSANDS</u>							
HEAD	1,778	2,644	77	9	4,508				
AVG WT	16.18	37.07	27.80	32.09	28.66				
LAST WEEK	1,978	2,909	71	9	4,967				
SAME WK YR AGO	1,936	2,688	80	2	4,706				
AVG WT	16.21	35.85	24.06	39.32	27.57				
TO-DATE/2003	27,217	42,296	931	251	70,695				
TO-DATE/2002	28,101	41,514	663	114	70,392				

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 24 APRIL 2003.

Trade sentiment on tom drums and tom full-cut wings ranged from steady at best to instances fully steady, tom necks steady. Instances of improved interest was noted on tom full-cut wings and drums, balance light. Offerings were mixed with some sellers holding tom full-cut wings with increased confidence and others were noting tom drums not as available as previous weeks, tom necks were mostly adequate. Trading centered on a moderate volume of tom wings for export, balance slow. Some industry members continued to watch for possible transportation problems for product delivered East or West Coast ports due to spot container shortages and back-ups at ports.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/	93.00		93.00	40
BREASTS, 4-8 LBS GRADE A—FRESH 2/				
BREASTS, 4-8 LBS PLANT GRADE 2/		W	85.00	200
DRUMSTICKS, TOM		W	19.00	20
DRUMSTICKS, TOM—FRESH				
DRUMSTICKS, HEN				
WINGS, FULL-CUT, TOM	13.00-14.50		14.00	120
WINGS, FULL-CUT, HEN		R	16.00	40
WINGS, V-TYPE, TOM		F	23.48	33
WINGS, V-TYPE, HEN		F	52.00	40
NECKS, TOM		M	21.58	95
NECKS, HEN				
BREASTS, B/S, TOM 3/		T	110.00	200
BREASTS, B/S, TOM—FRESH 3/		F	120.59	340
THIGH MEAT		T	47.25	40
THIGH MEAT—FRESH		T	53.00	40
BREAST TRIM MEAT		W	69.00	40
SCAPULA MEAT		F	62.00	40
TENDERLOINS				
DESTRAPPED TENDERS				
DESTRAPPED TENDERS—FRESH		M	117.34	82
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/		W	19.00	40
MECHANICALLY SEPARATED—FRESH 4/		W	20.00	10
EXPORT TRADING				
DRUMSTICKS, TOMS		W	19.00	40
WINGS FULL-CUT - TOMS	12.00		12.00	520
WINGS, V-TYPE, TOM				
TAILS		T	18.50	40
MECHANICALLY SEPARATED 4/		R	14.41	196
THIGH MEAT - FROZEN		W	48.00	40

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 25 APRIL 2003.

The white meat undertone was mostly steady. Instances of increased activity was noted on various white meat items, however, offerings generally satisfied buyers' needs. The undertone on 4-8 lb. breasts was steady to barely steady as sellers attempt to resist the lower trending trading levels. Offerings adequate to instances burdensome. The undertone on fresh mechanically separated turkey (MST) was mostly steady, frozen steady at best. Some increased activity was noted on fresh MST for domestic shipments with demand ranging light to instances fair, frozen was light into export channels. The thigh meat undertone continued mostly steady with increased activity noted into export channels. Offerings available. Domestic trading centered on light volumes of fresh tom breast meat and frozen destrapped tenderloins. Some frozen tom breast meat traded at 123 cents delivered June. Export trading centered on a heavy volume of frozen thigh meat, balance light. Mixed defatted gizzards traded at 43.50 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		R	93.00	40	93.00	40
BREASTS, 4-8 LBS GRADE A—FRESH 2/						
BREASTS, 4-8 LBS PLANT GRADE 2/	81.00		81.00	40	84.57	280
DRUMSTICKS, TOM	21.00		21.00	40	19.70	115
DRUMSTICKS, TOM—FRESH	19.00		19.00	12	19.00	12
DRUMSTICKS, HEN	18.00		18.00	80	18.00	80
WINGS, FULL-CUT, TOM		R	14.00	120	13.80	150
WINGS, FULL-CUT, HEN						
WINGS, V-TYPE, TOM	26.00		26.00	10	26.00	10
WINGS, V-TYPE, HEN	53.00		53.00	40	53.00	40
NECKS, TOM	22.00		22.00	8	21.61	103
NECKS, HEN						
BREASTS, B/S, TOM 3/		T	110.00	200	110.00	200
BREASTS, B/S, TOM—FRESH 3/	118.00-123.00		118.65	374	118.65	374
THIGH MEAT	47.00		47.00	20	47.17	60
THIGH MEAT—FRESH	53.00-55.00		54.23	26	52.83	118
BREAST TRIM MEAT		W	69.00	40	69.00	40
SCAPULA MEAT		F	62.00	40		
TENDERLOINS						
DESTRAPPED TENDERS	104.00		104.00	280	104.00	280
WING MEAT WITH SKIN	52.00		52.00	40	52.00	40
DESTRAPPED TENDERS—FRESH	117.00		117.00	14	117.29	96
MECHANICALLY SEPARATED 4/		W	19.00	40	19.00	40
MECHANICALLY SEPARATED—FRESH 4/	18.00-20.00		18.53	170	18.73	330
EXPORT TRADING						
DRUMSTICKS, TOMS	18.50-22.00		20.13	224	18.80	638
WINGS FULL-CUT - TOMS		R	12.00	520	12.13	600
WINGS, V-TYPE, TOM						
TAILS		T	18.50	40	18.50	40
MECHANICALLY SEPARATED 4/	18.00-19.00		18.36	144	18.36	144
THIGH MEAT - FROZEN	43.50-63.00		48.85	668	51.19	1,000

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.